



NBRSS_{Today}

Supporting Scientific Research through Business Solutions

October, 2001

“All great achievements require time.” -- David Joseph Schwartz

News and Highlights	Page 2
Staffing Update	Page 2
Project Status	Page 2
Functional Teams	Page 2
Property	Page 2
Travel	Page 3
Acquisition/Supply	Page 3
R&D Contracts	Page 3
SSF	Page 4
EHRP	Page 4
Special Feature	Page 4
Financial Team	
Executive Corner	Page 4
Change Management	Page 5
Communication	Page 6
Training/Workforce Planning	Page 6

From our Project Manager...

Welcome to our publication, which has been established to keep the NIH community informed about the ongoing activities of the NIH Business and Research Support System (NBRSS) project. As we rapidly approach the end of the Design Phase of project implementation, our Functional Teams with their Resource Teams, are finishing the development of future NIH business processes. Functional Advisory Committee members have begun reviewing and approving proposed future business processes, so we can soon forge ahead into the next step of the project – Configuration, which is scheduled to begin in November of this year. This phase begins with configuring the software consistent with the future work processes designed by the teams, and extensive testing will be conducted in each functional area. Read about what the Functional Teams have been working on and what might be in it for you.

Financial Management will be the first module to go live with the new system, and the rollout is scheduled for September of 2002. Check out our “Special Feature” to see what Wayne Berry, Mary Cushing, and Della Wilson have been doing on the Financial Management Functional Team. Stay tuned as the NBRSS project progresses!

Colleen Barros
Project Manager, NBRSS

News & Highlights:

Staffing Update – The Project Management Structure reflects current positions and the respective incumbents. < http://nbs.nih.gov/mgmt_struc.html>

The NBRSS is pleased to welcome Flo Andrews to the Enterprise Human Resources Planning (EHRP) Team. Flo was previously with the Office of Research Services (ORS) as a Human Resources (HR) Specialist, where she served in a lead role for the technical review and approval of HR actions for ORS employees. She has participated in a variety of EHRP activities at the Department and brings valuable experience with the PeopleSoft product.

Project Status – The NBRSS project is concluding the Design Phase, which encompasses the development of models for each business process in each functional area. After months of weekly meetings, the Functional Teams, with their respective Resource Teams, are finishing up the future process designs, and the Functional Teams have begun presenting process summaries to their respective Functional Advisory Committees for review and approval. The Functional Advisory Committee members, who are leaders in the scientific and business communities, are ensuring that the proposed processes adhere to NIH policies and guidance from higher authorities, attempting to resolve outstanding issues, and making recommendations to the Administrative Management Systems Steering Committee (AMSSC), regarding potential interfaces, customizations, and function-specific issues having NIH-wide concern. Please click here for a listing of all Functional Advisory Committees and Resource Team members <insert link>.

Following the Design Phase is Configuration, which is comprised of two Conference Room Pilots (CRP). During CRP1, the Functional Teams and Systems Integrator will work together to configure the software consistent with the work processes developed in the Design Phase, and then the configured software will be tested within each function. As the configuration and testing proceeds, the work processes may require modifications, and customization issues may emerge that require review, evaluation, and decisions by the AMSSC. CRP1 is scheduled to begin in November of this year.

During CRP2, which is scheduled to begin in February of 2002, the software will be further tested to ensure that all NBRSS functions are integrated. Resource Team members will have the opportunity to participate in the testing and provide their input. Interfaces between the various functions and between the Administrative Data Base (ADB) and NBRSS will be tested to verify their effectiveness, and system administration will be tested to evaluate cross-functional integration of workflow, including human resources. Finally, data conversion and interfaces between the NBRSS and ADB will be fully tested using both test and live data, whenever feasible.

An inside look at the Functional Teams...

Property – The Property Team, with their Resource Team and Functional Advisory Committee, is defining the workflow processes supported by the new property management system, based on the functional requirements developed during the NBRSS Phase I. Together, they are completing the process descriptions for the purchase, transfer, and disposal of accountable, and as appropriate, non-accountable property. The team is working in conjunction with the Acquisition/Supply and Finance Teams to ensure standardization of information. In addition, the Property Team has updated the project

<http://nbs.nih.gov>

NBRSS TODAY

work plan to reflect the NIH property management functional requirements, and they look forward to the installation and testing of the DataStream software in late October.

Travel – As they near implementation of CRP1, the Travel Team is working on a series of project tasks, which include:

- Designing a set of travel processes and requirements for Gelco (developers of the Travel Manager™ System) to be used in the development of a new module for Relocation Travel;
- Directing a detailed proposal document for Gelco to be used in the development of the Sponsored Travel component of Travel Manager;
- Validating and realigning travel object class codes for inclusion in the General Ledger Accounting Classification System; and
- Configuring and setting permission levels in Travel Manager to ready the system for CRP1.

The Travel Team looks forward to the installation and testing of the Gelco/Oracle interface software in late October.

Acquisition/Supply – The Acquisition/Supply Team is completing the workflow processes that will be used in the CRP test cases, beginning in November. They and their Resource Team have discussed and concurred with the first grouping of processes to be presented to their Functional Advisory Committee for approval. This document, entitled “Requisition Processes,” summarizes six different requisition processes, and includes a copy of each process and an outline of any issues having a major impact on them.

Inventory – The Inventory Team is working to replace the computer system currently used by both the Division of Engineering Services (DES) and central supply programs. The plan is to track and manage supply items from receipt at the warehouse to delivery at the customer’s location. The new system will feature Self Service Stores with an improved checkout system. Some practical benefits for the customer include better stock availability, easier ordering, improved supply delivery, more accurate pricing, and additional on-line information concerning stocked items.

Research and Development (R&D) Contracts – The R&D Contracts Team is making excellent progress towards its goal of a redesigned R&D contracting process, thanks to the advice and assistance of its Resource Team and Functional Advisory Committee. With the Resource Team’s help, the team has finished designing the pre-award and award processes and has nearly completed the post-award and closeout. The Functional Advisory Committee has approved the detailed work plan and the pre-award design, and is in the process of reviewing the award design. The R&D Contracts Team provided the Acquisition Management Committee with a project update on September 11, and they encourage the NIH R&D contracting community to keep informed through the NBRSS communication vehicles, such as the newsletter and website, the Resource Team and Functional Advisory Committee members, or the team members directly.

Service and Supply Fund (SSF) – The SSF Team, in collaboration with their Resource Team, has been designing the preliminary Oracle Projects Set-up and Cost Accumulation Processes by integrating the Oracle software processes with the NIH Central Service Activities' business processes. The Oracle Project Set-up and Costing Processes will provide the ability to define projects; breakdown work structures and budgets; and record

and report costs against projects. The team is working on the integration with other Oracle Applications including Financials, Inventory, and Purchasing to account for costs. These are iterative business processes, which will be tested and validated in the upcoming CRP sessions. The DES and the Medical Arts and Photography Branch are the activities that have been selected to participate in the CRP.

Enterprise Human Resources Planning (EHRP) System – The EHRP Team has installed the Department’s development version of the PeopleSoft product and is formulating plans for conducting a functional fit analysis to evaluate where this version meets (“fits”) and does not meet (“gaps”) NIH’s business requirements. Where gaps are identified, solutions for addressing them will be proposed for consideration by the NIH EHRP stakeholders. In the near future, the EHRP Team is planning to conduct demonstrations of the PeopleSoft product for human resources, administrative, and management staff. Stay tuned for more information about the demonstrations.

Special Feature-Financial Management Team Update:

We are pleased to provide you with an update on the Financial Management Team and their role in implementing the NBRSS system at the NIH. Over the past few months, many of us have heard about “One DHHS” - an initiative by Department of Health and Humans Services (DHHS) Secretary, Tommy Thompson, to develop greater commonality among the various components of the Department. In that spirit, work has begun on the development of a Unified Financial Management System (UFMS) within the Department. NIH has been designated as the organization to test the “proof of concept” for systems implementation of the DHHS Corporate System.

The Financial Management Team has embarked on the UFMS endeavor as part of their role in developing the NBRSS. As many of you already know, Financial Management was the first Functional Team established because it is the first module scheduled for implementation. One of the most significant challenges this team will face is converting data in the General Ledger (GL) to the new system. The Financial Management Team is beginning with the core function, since all other functions to be deployed in the NBRSS will directly or indirectly feed data to the GL. Making the GL available first will simplify the financial interfaces for all other functions and reduce the number of temporary interfaces to legacy financial processes.

To determine if the NIH’s requirements can be met by this new system, the Financial Management Team plans to test various configuration methods when the NBRSS launches its CRP. During the CRP, the team will convert GL balances for fiscal year 2000 and transactions from the first quarter of 2001. These funds will include the Office of the Director (OD) and the National Institute on Aging annual appropriations, all of the Management and Service and Supply Funds, the Gift Fund, Cooperative Research and Development Agreements (CRADAs), and Royalty allotments within the Management Fund.

The Functional Team members leading the charge for the financial management portion of the NBRSS are Mary Cushing from the National Cancer Institute, Wayne Berry, and Della Wilson, both from the Office of Financial Management.

As with any other large project, success greatly depends on the contributions from the NIH community. To this end, the Financial Functional Advisory Committee and Financial Resource Team have been established and are currently advising Mary, Wayne, and Della about issues relating to implementation of the financial management module, such as:

- *Developing a chart of accounts to enhance today's Management Account Structure.* The new chart of accounts, known as the Accounting Classification Structure (ACS), will attempt to standardize organizational codes with DHHS Standard Administrative Codes. The ACS segments, e.g., organization codes, can be accessed independently so the data can be summarized from multiple perspectives to meet the needs of many audiences. In addition to segments needed to meet Generally Accepted Accounting Principles, there will be segments for NIH specific information, such as mechanism and program.
- *Implementing funds control at the allotment and allowance levels.* Funds control seeks to ensure that managers are made positively aware of the funds they are authorized to spend and that obligations do not exceed the budget authority available to pay for those obligations. Oracle Financials has considerable capacity in this regard, and the Financial Management Team is consulting extensively with their Resource Team and Functional Advisory Committee to ensure that funds control and budgeting procedures meet the needs of every level of the organization.
- *Developing a set of transaction codes that align with Treasury, DHHS, and NIH uses.* The U.S. Treasury has published a standard set of accounts and transaction codes that agencies are urged to adopt. Converting to the U.S. Standard GL will bring NIH in compliance with the best accounting practices.

Executive Corner:

The AMSSC continues to meet on the 2nd and 4th Thursdays of the month. For a current listing of the steering committee members and the most recent meeting minutes, please click here. < <http://nbs.nih.gov/index.html>>

Change Management:

“Change is difficult but often essential to survival.” -- Les Brown

Change is the one constant in life. We experience radical change, discontinuous change, and changes so insidious they are almost unrecognizable until they are fully incorporated into our lives. The key to a successful change management effort is preparing a resilient workforce that is receptive to change, adaptive to change, and eventually proactive for change. Organizational managers sometimes underestimate the impact that change management has on the project success. Considered “fluffy or marshmallow stuff”, change management is viewed as the handholding, tear wiping final phase of the project, when the old system is disabled and the new system is activated. That clearly is a misrepresentation.

August's Newsletter addressed stages that individuals experience when undergoing a change: disbelieving, balking, testing, and adapting. Organizations also experience various stages of change: *destabilizing*, *acknowledging*, and *re-stabilizing*. New

information will challenge those old, long held beliefs; thereby, *destabilizing*, current perceptions and attitudes. The transformation begins when employees collectively *acknowledge* that things can be done differently and perhaps improved to their benefit. *Re-stabilization* occurs when employees believe the organizational benefits justify the personal risk associated with the system change.

Any organization that has undergone major change recognizes change management as an essential component of the project's strategic plan. When adequately addressed, change can be less disruptive and more readily accepted by the workforce in a system implementation. For more information and to read the Change Management Plan, click on <http://nbs.nih.gov/opdocs/documents.html>.

Communication –

“Words do two major things: They provide food for the mind and create light for understanding and awareness.” --Jim Rohn

A formal Communications Plan has been developed and approved by the AMSSC. The intent is to provide guidance about how project information will be disseminated to and received from the end-user community. The plan will soon be available on the NBRSS website.

The current website, *NBS Matters*, provides information about the NBRSS project and will be maintained while a new site is being developed by a contractor who has recently been selected. Construction of the new site will begin soon. <URL to existing site>

Training and Workforce Planning –

Training: We are in the process of developing the NBRSS End User Training Strategy that will serve as a blueprint for implementing training. The Strategy will identify training methods, additional support needed after training, expectations from the training efforts, and potential risks if the training plan is not executed. This document will provide the foundation for functionally specific training plans that will outline in detail the training content, schedules, and materials needed as training for each functional area is deployed.

Workforce planning: We are also in the process of developing the NBRSS Workforce Transition Strategy, which will outline a high-level approach for moving people into the new organizational structure. Workforce planning activities will be coordinated with representatives from the affected organizations, OHRM, Institute/Center and OD Human Resources Offices, and the Office of Equal Opportunity to ensure that workforce plans are appropriate and consistent NIH-wide.

Questions/Feedback: We encourage you to share this publication with your colleagues, staffs, or anyone else who may be impacted or interested in this project. For information, comments, or questions about the NBRSS project or newsletter, contact Marina Gregory at <mailto:gregorym@mail.nih.gov>. The next distribution of *NBRSS Today* is scheduled for December.

Publication Contributors:

Kevin Green, NIH Presidential Management Intern

<http://nbs.nih.gov>

NBRSS TODAY